

# Invite Suppliers to Your Portal

Grab & Go covering how to invite supplier representatives to your Supplier Portal.

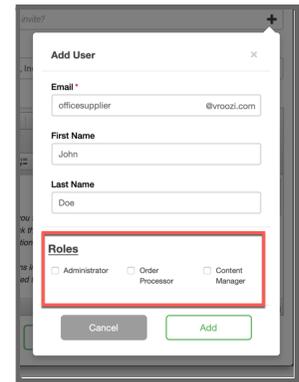
## 'Supplier User' Roles

**Administrator:** Create users, edit the company profile, add comments to and create all transactional documents.

**Order Processor:** Reject and confirm POs, create invoices and ASNs and add comments to transactional documents.

**Content Manager:** Manage their Vrooz Catalog content with a single sign on via the Portal. Content Managers can create and update catalogs on the buying organization's behalf. Buying organization approval will still be required before changes go live.

- Like and administrator and order processor, they can also complete all portal transactional flows
- **Tip!!** We recommend rolling out this permission after initial adoption of the platform and workflows has been executed by the supplier.

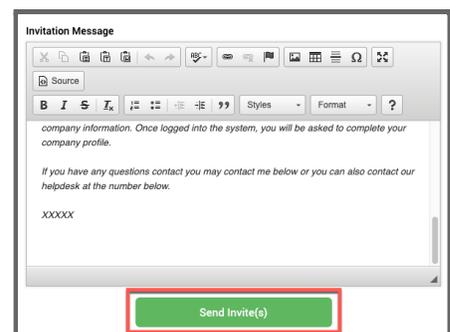


## Steps:

1. Navigate to the Supplier Users view within *Supplier Portal* → *Users*
2. Select 'Invite a new user'
3. Link to the employee's Supplier



4. Complete all details & select the user role
5. Customize the Invitation email message and select 'Send Invite(s)'
6. Supplier user's record will now be listed in the Supplier Tab of their supplier record and under Supplier Portal → Users. Once a supplier user is invited, their user record is not editable. If edits are



required, you must remove the user and create a new account.

*\*Supplier invitation and supplier user creation can also be managed from the existing Supplier record.*

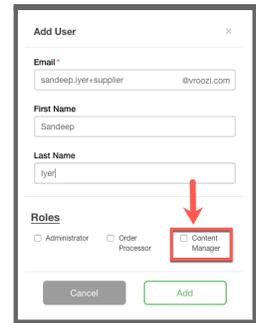
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## Additional step for 'Content Manager' Users

Note: There are **2** steps required to set up the Content Manager role. The Supplier contact must be created as a Supplier Portal user in Vroozii Purchase **and** as a supplier user within the Supplier's record in Vroozii Catalog.

### Steps:

1. In *Vroozii Purchase* via Supplier Portal User creation.
2. In *Vroozii Catalog* via the Supplier's record. Enter the supplier user's email and name.



The screenshot shows a modal window titled "Add User" with a close button (X) in the top right corner. It contains the following fields and options:

- Email:** A text input field containing "sandeep.jyer+supplier" and a dropdown menu showing "@vroozii.com".
- First Name:** A text input field containing "Sandeep".
- Last Name:** A text input field containing "jyer".
- Roles:** A section with three radio button options: "Administrator", "Order Processor", and "Content Manager". The "Content Manager" option is selected and highlighted with a red box and a red arrow pointing to it.
- Buttons:** "Cancel" and "Add" buttons at the bottom.

